# Feeding America West Michigan Food Bank (FAWM)Online Ordering System User Manual

Primarius Web Window (PWW)

March 2014

# Contents

## Benefits

- Connects to live data which means that the available quantities are current.
- Able to print a shopping list.
- Able to place your order on line.
- Able to check on orders, statements, invoices, and grants. On many of the tables (*such as Statements, Invoices, Orders*) double left clicking on the line will produce a new window with more details.
- Some of the Agency information will also be displayed graphically.

This software also has the capability of creating a unique user name and password for each individual on the account which not only identifies who has completed which Agency process but also increases Agency account security. **PLEASE NOTE:** This is where the software provider's additional charges come into play. We are planning to start most agencies off with only one username and password, and we **reserve the right to pass a fee along for additional usernames and passwords**.

## Adobe Software

To view or print many of these items you will need to have installed on your computer the free software called Adobe Reader. You can find this at http://www.adobe.com

## Reminders

- Use the Logout link in the upper right hand corner to close your Online Web Ordering session.
- When on a particular page, use the Help link in the upper right hand corner to clarify frequently asked questions.
- Your Agency relations representative can assist you in answering questions regarding your Agency's contents on the Web.
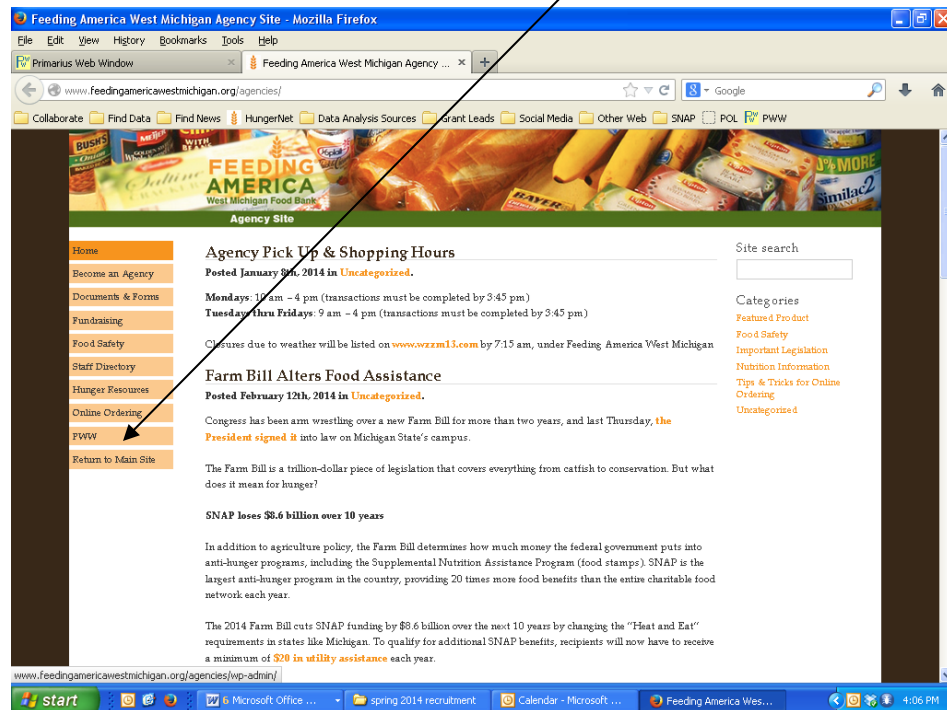
## Accessing the On Line Web Ordering System

You will begin the same by going to http://www.feedingamericawestmichigan.org
- Agency Site link at the top right of the page
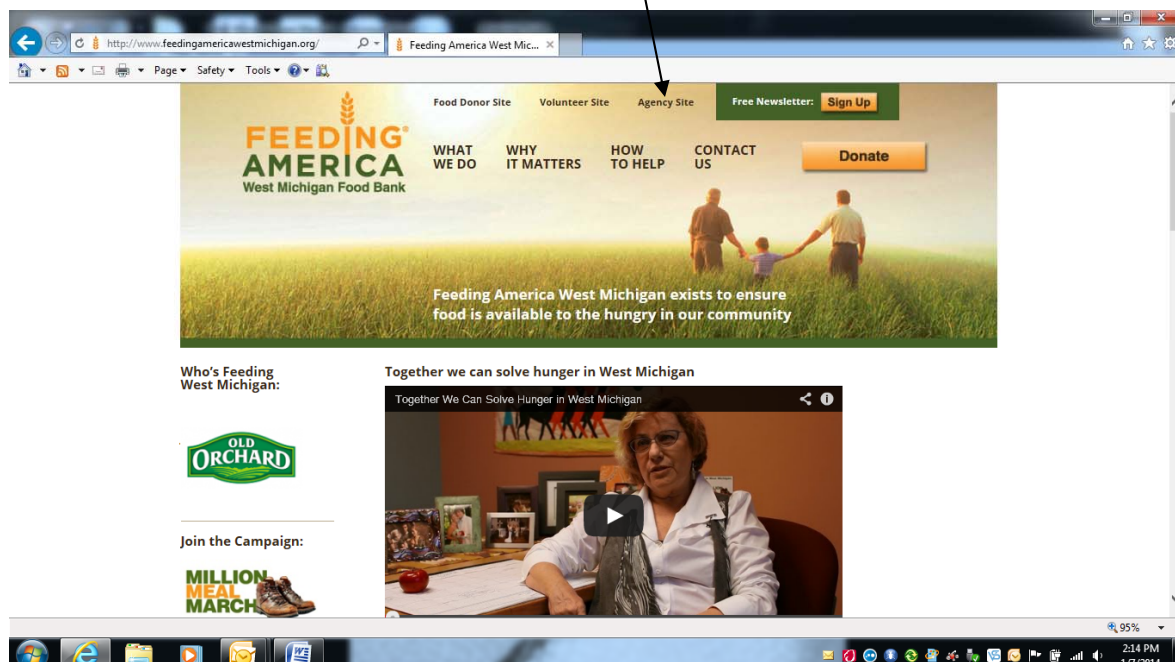
You will then Login onto PWW (we will change this name back to Online Ordering after removing POL

- PWW Link at the middle left of the page



The next window will look a little different.  Your agency may have several people ordering. With the new online ordering system, each person authorized to order food online will have their own unique user name and password. The ordering staff will need to know:

- The Agency number
- Their personal username
- Their personal password

## The Home Page

From the home page, you can view and directly access your shopping cart by using the 'Your Cart' tab. You can also select any of the other tabs to look at Agency information. This informational handout will walk through all the tabs to describe what you will see.

**Administrator View**



**Order Entry View**



Note that in both cases the Home primary tab has a Your Cart secondary tab – if you already have an order started, you can use that to return to your order.

# AGENCY INFORMATION

If you click on the My Agency link in the upper right-hand corner, you will see:

**Administrator View**



**Order Entry View**



*Note the tabs in the lower window pane –*

- Agency Info – Administrator & Order Entry Views
- Locations – Administrator & Order Entry Views
- Contacts– Administrator & Order Entry Views
- Hours– Administrator & Order Entry Views
- Open AR – Administrator View
- Service Info – Administrator View

These tab windows show what information FAWM has recorded on your Agency file.

## Locations Tab

The addresses listed are the different addresses that FAWM has on file for your Agency.



## Contacts Tab

The contacts listed are the different contacts that FAWM has on file for your Agency.
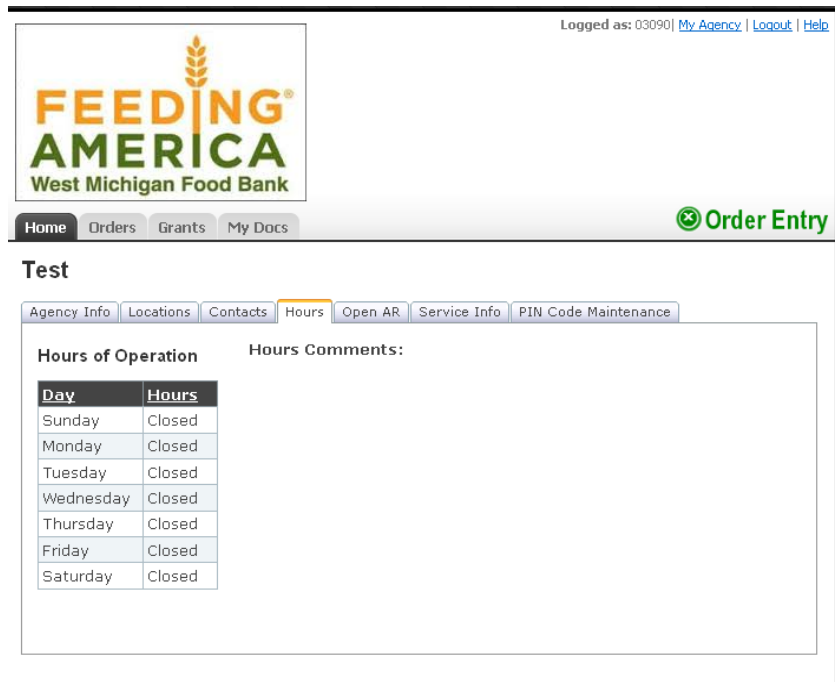
# Hours Tab

These are your Agency's business hours that FAWM has on file.
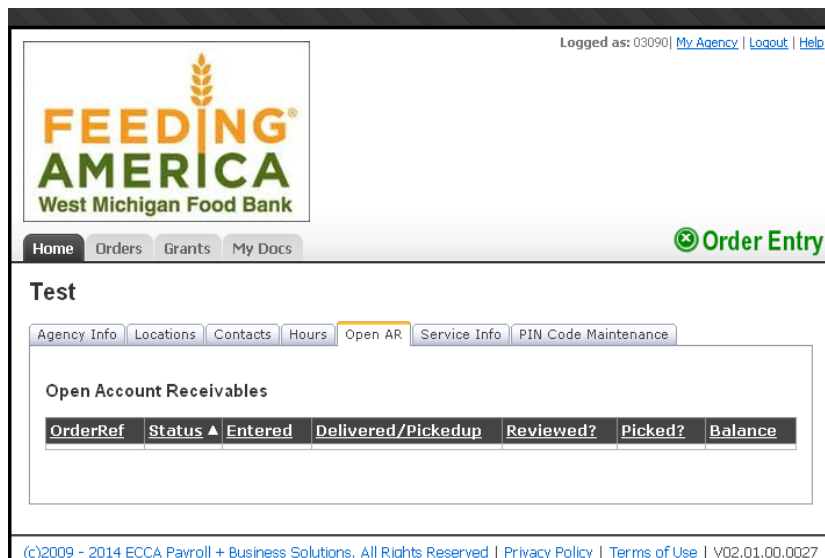


## Open AR Tab

Shows *Administrators* if the order:

- Is Open or Closed
- Has been Reviewed by FAWM
- Has been Picked (*selected*) by FAWM
- Has a Balance

## Service Info Tab

Displays to *Administrators* different graphs and charts based on the Agency's Statistics.
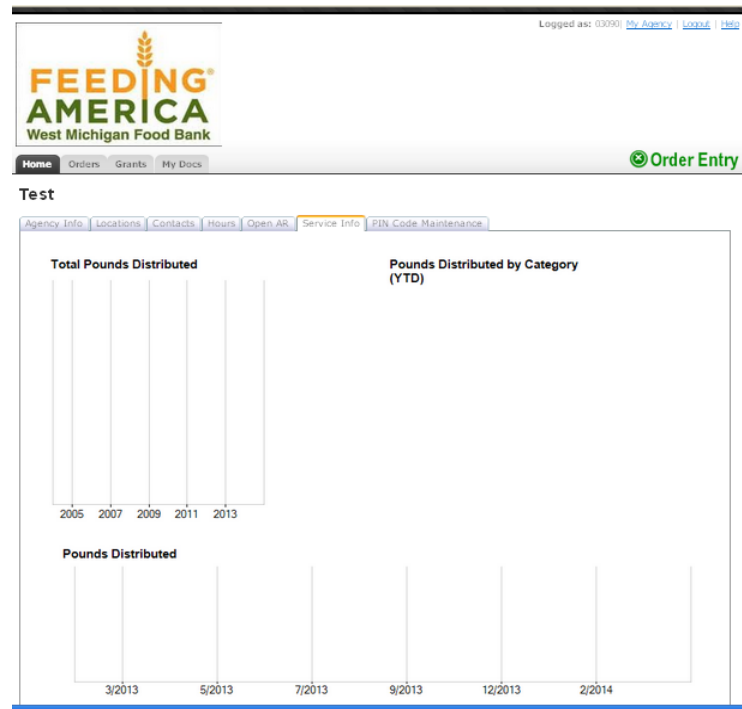


# PLACING AN ORDER

## The Home page:

**Administrator View**

**Order Entry View**



Select the **+ Order Entry** on the right side of the screen to start your order

**PLEASE NOTE:** We are using a feature called "LIVE SCHEDULING" – this means that in addition to choosing your product, pick up date, and time, **you will choose your location**, too.  If you are not doing so already, you will need to **treat your scheduled order time as an appointment** to keep. By selecting a door and a time, you are reserving it for your use – if you miss your slot you may need to wait until another one opens up.  **(Depots are an exception – still arrive at 11 am.)**



Once you've selected your location and pick up date and time, click continue.

*Note the four buttons*:
- **Cancel Order**: Select to delete the entire order and start over with a new location/date/time.
- **Print Shopping List:** Select to print a shopping list.
- **Print Cart:** Select to print the items in the cart.
- **View Cart:** Select to view the items within the cart.

If you want to see all the products on a single web page, use the Page Size dropdown on the righthand side of the screen to select "all".

The **Search textbox**  allows you to type in the product name or the product reference number to search the shopping list for that particular item.

The **Ref (***reference***)** column contains the item number. Clicking on the product reference number  will bring up a new window containing the product details and the product photo (if available).

Place quantity of item in the **Qty Textbox** and either tab or select another **Qty** box by moving the mouse cursor. While the system is placing the item in your cart you will see  above the available column.

The **Red X**  selection will delete the item quantity from the cart.

The **starred columns (☆)** indicate columns that the Shopping List can be sorted on. Clicking on the **underlined word** will sort the column in ascending or descending order. Keep clicking the word until you get the view you want. *Note the small arrow* pointing downward  indicating an ascending selection (*smallest number to largest number or alphabetical*).

Clicking on the **Star (☆)** in the Type Column creates a drop down list so you can select the category you want.



At the bottom of the list you will see **Apply** so that the column will only show those items or **Reset** to erase previous selections.



Then you will only see what is filtered and the **Star (☆)** turns **yellow** indicating a filter is on:



Clicking on the **Yellow Star (☆)** and selecting **Reset** at the bottom of the column will remove the filter.

On the shopping list, more product information can be found by clicking on the reference number

or the camera icon (when available)

| Item Count: | 0 | | Total Weight: | 0 | | Purchase Cost: | $0.00 | | Service Fees: | $0.00 | | Total Cost: | $0.00 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | Grants Applied: | $0.00 | | Payments: | $0.00 | Balance: | $0.00 |

Search: baby  ☐ Free Food Only  [Search]  Reset                    Page size: 20 ▼

| Ref | Product | ★ Storage | ★ Type | ★ Category | Price | VAP | Unit | Weight | Available | Grant | Qty | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 12123 | BAB BABY FOOD APPLES | Dry | 02-BABY FOOD/FORMULA | S/H National | $1.08 | $0.00 | Case | 6 | 300 | Yes | | ✖ |
| 12504 | BAB OATMEAL BABY FOOD | Dry | 02-BABY FOOD/FORMULA | Local | $0.72 | $0.00 | Case | 4 | 1 | Yes | | ✖ |
| 71005 | NFI BABY WIPES (3 CS LIMIT) | Dry | 01-ASSORTED NON-FOOD ITEMS* (NOT COVERED BY GRANT) | Local | $1.26 | $0.00 | Case | 7 | 17 | No | | ✖ |

< Prev **1** Next > | Page 1 of 1

[Print Shopping List]  [Print Cart]  [View Cart]

A product detail page will show with the product image when available.

**Product Details**

**12123 - BAB BABY FOOD APPLES**

| | |
|---|---|
| Category: | S/H National |
| Storage: | Dry |
| Second Harvest Type: | f Manufacturers-Processors |
| Packaging: | (4)6 count |
| On Hand: | 300 |
| Unit Weight: | 6 |
| Unit Measure: | Case |
| Price Per: | $1.08 |
| Description: | |

# Print Shopping List Button

To print a shopping list, select the **Print Shopping List** button.
   A new Web window will appear with the following message
      Select **Open** button

**File Download**

Do you want to open or save this file?

Name: ShoppingList-10003.pdf
Type: Adobe Acrobat Document, 51.8KB
From: cloudcity.goecca.com

[Open]  [Save]  [Cancel]

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?
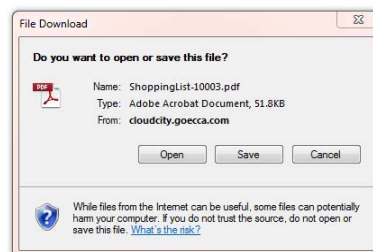
A printable shopping list will appear:

**Shopping List**

ANTIOCH TABERNACLE
Date Printed: 1/9/2012 At 2:41 PM
*Item availability may change prior to ordering.

| Ref | Product | Category | Storage | Type | Weight | Available |
|---|---|---|---|---|---|---|
| 10010 | CME PIZZA ASSORTED | Local | Frozen | 06-COMPLETED MEALS/ENTREES | 30 | 12760 |
| 10525 | BEV COFFEE DECAF (5 CASE LIMIT) | Local | Dry | 03-BEVERAGES (NOT COVERED BY GRANT) | 10 | 55 |
| 10806 | RIC RICE | Local | Dry | 24-RICE | 22 | 43 |
| 11069 | DAI YOGURT GREEK | Local | Refrigerated | 07-DAIRY PRODUCTS | 13 | 57 |
| 11282 | CER HONEY & OAT BLENDERS (6 CS LIMIT) | S/H Local | Dry | 05-CEREAL | 17 | 11 |
| 11387 | CER CINNAMON TOASTERS CEREAL (6 CS LIMIT) | S/H Local | Dry | 05-CEREAL | 16 | 59 |
| 11823 | CER OATMEAL INSTANT | Local | Dry | 05-CEREAL | 3 | 1060 |
| 11953 | SNA ANIMAL COOKIES | Local | Dry | COOKIES (NOT COVERED BY GRANT) | 13 | 22 |

# Print Cart Button

To print a shopping cart, select the **Print Cart** button.
   A new Web window will appear with the following message
      Select **Open** button
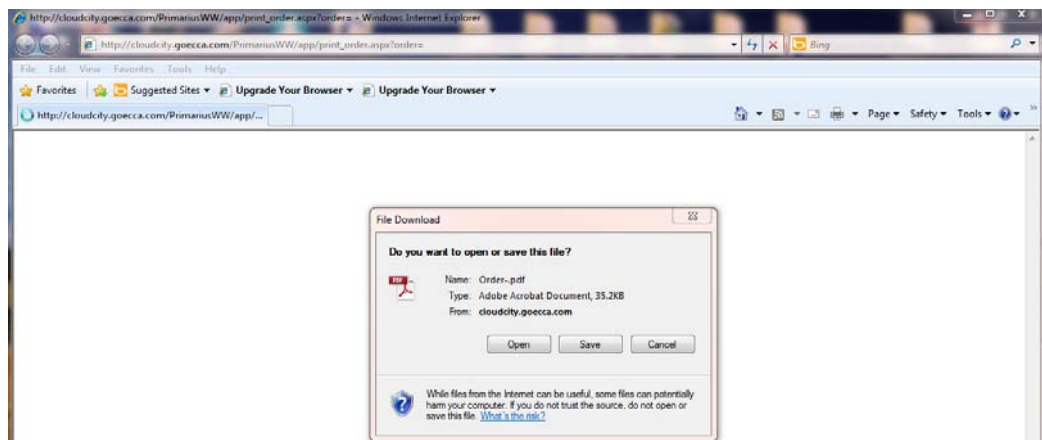


A printable cart list will appear:

**Order#**

Order Placed: 11/10/2006
Warehouse: ECCA-PUG2011
Delivered/Picked Up: 11/10/2006 At 12:00 AM
Deliver/Pick Up Location: No Del/PU Location

| Product Ref | Product | Category | Quantity | Weight | Total Cost |
|---|---|---|---|---|---|
| | | No product found. | | | |
| | | Totals: | 0 | 0 | $0.00 |
| | | Grants Applied: $0.00 | | Payments: $0.00 | Balance: $0.00 |

## View Cart Button



If your order has specific instructions please add this to the Comments Field

Choose pick up method and date and time you will arrive to get your order

(*The Contact Information will be removed from the live version)*



Select the **Shopping List** button to return to the shopping list.

Select the **Checkout** button to submit your order to FAWM. (Contact Information must be entered for your order to submit successfully. If you leave any of the Name/Phone/Email spaces blank, you will be prompted to add content before clicking Checkout again.)

## The Checkout Button

After selecting the **Checkout** button, a successful submission will show the following message:
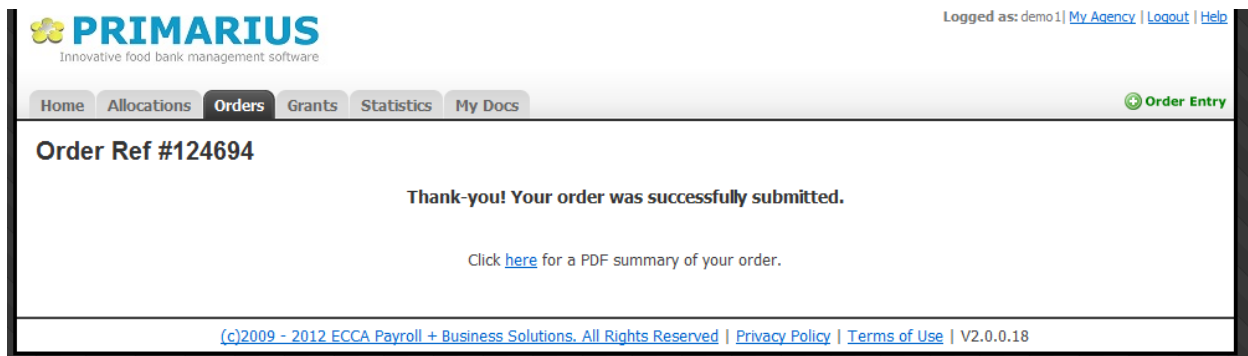


Clicking on the 'Click here for a PDF summary of your order' will show the following message:
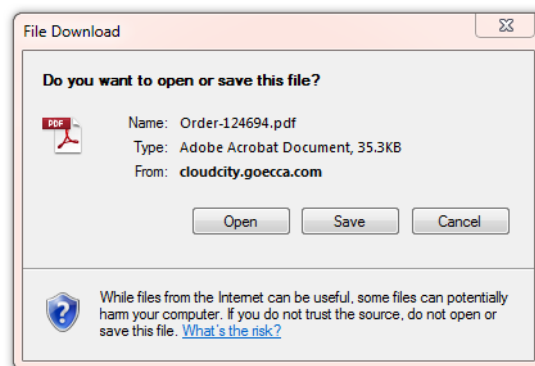


Selecting the **Open** button will show the order summary:



Order# 124694

Order Placed: 1/9/2012
Warehouse: ECCA-PUG2011
Delivered/Picked Up: 1/13/2012 At 9:45 AM
Deliver/Pick Up Location: No Del/PU Location

| Product Ref | Product | Category | Quantity | Weight | Total Cost |
|---|---|---|---|---|---|
| 90815 | USDA ROLLED OATS (B445) | USDA | 1 | 41 | $0.00 |
| | | Totals: | 1 | 41 | $0.00 |
| | | Grants Applied: $0.00 | | Payments: $0.00 | Balance: $0.00 |

# HOME SCREEN WINDOW

## HOME - Home Tab

Displays messages from the food bank such as closed dates, recalls, etc.  In addition, any relevant links to other Web pages are displayed under the **Notable Links** heading.

**Administrator View**
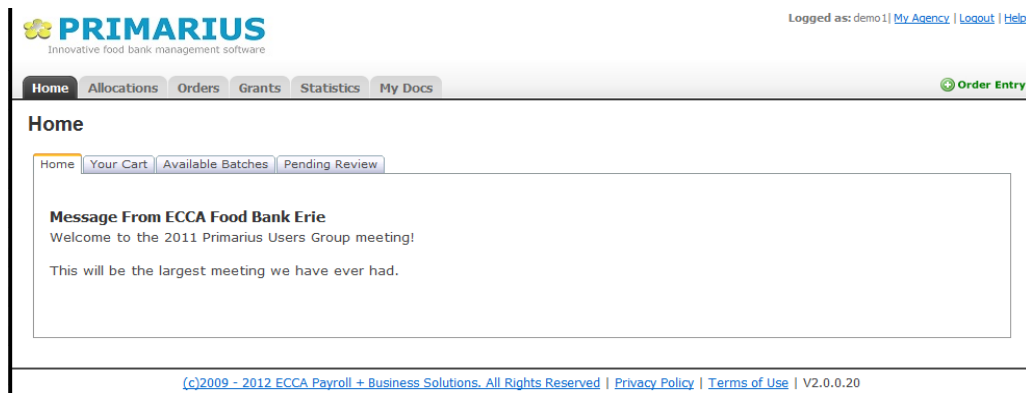


**Order Entry View**
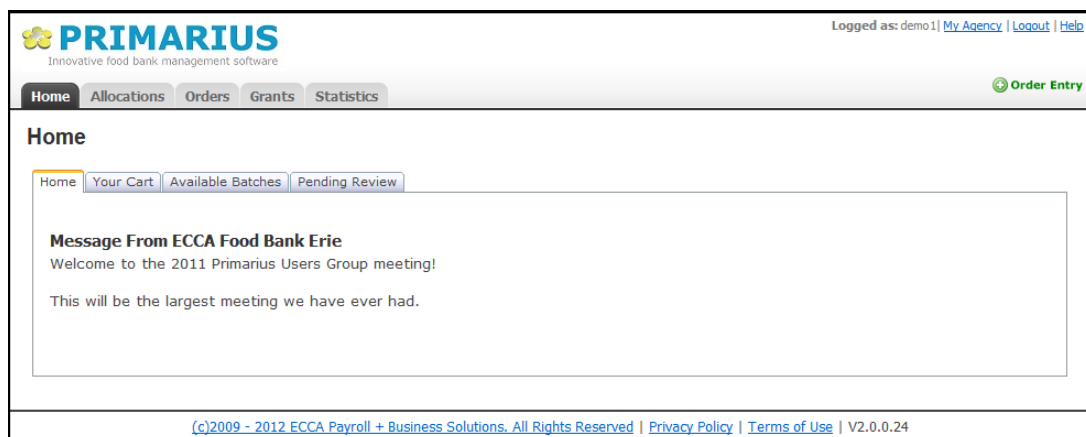


*Note that only the Administrators can view the My Docs Tab*

## HOME -Your Cart Tab

Short cut to what is currently in your shopping cart.  This tab window displays the current items in your cart along with basic summary detail.  Click the **View Cart** button to go to the view cart window and either select the **Shopping List** button to continue the order or the **Checkout** button to begin submitting the order to TNWOFB.  If you do not have an order in process, click **Order Entry** to start a new order.



# Orders Tab

This lists all of the orders for your Agency and their current status.

Left clicking on a table row (*line*) will bring up the order details.

# Grants Tab

This lists the grants that have been applied to an Agency with amounts used, initial balances, and remaining balances.



# My Docs Tab

### MY DOCS – Statements Tab

This window lists your Agency's statements that have been published to view online – for *administrators* only.



If you **click on a file name** (for example: Statement for 8-31-2011.PDF), you would see:

## MY DOCS – Invoices Tab

This window lists the invoices for your Agency.



# Digital Signature Capability

Another feature we'll be rolling out this summer is switching from handwritten signatures to digital signatures.  Each username and password set up in PWW can create a PIN code to digitally sign for orders at the warehouse.  Here's how you create your PIN:

Click on the My Agency link in the upper right-hand corner.  You will see:



In the second layer of tabs, choose PIN Code Maintance (on the far right)

And then you can set up your PIN according to the directions provided: